Volume

1

FLEET SERVICES DEPARTMENT

City of El Paso, Texas

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FleetAnywhere
Users Guide

FleetAnywhere Users Guide

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Chapter

1

Introduction

FleetAnywhere is the single most important tool we have to maintain the vehicles and equipment of the City of El Paso in a cost effective and responsible manner.

F leetAnywhere is the official record for all City owned vehicles. It contains the official vehicle maintenance records required by the State of Texas. It is essential the data contained in FleetAnywhere is accurate and up to date. Any accident investigations, insurance and liability claims, and financial decisions will rely on the information in this system. This guide will address specific requirements of the Fleet Services Department in the use and operation of FleetAnywhere. It will explain unique rules and procedures that we will follow in order to best utilize the functions of the software. It will specify procedures for equipment, work orders, parts, fuel, reports and other administrative items. It should compliment the FleetAnywhere users guide published by the software developer.

Administration

The System Administrator for FleetAnywhere is responsible for all aspects of the software. The department's Administrative Analyst is the System Administrator. The Administrative Analyst is the approval authority for any and all changes in the system. All issues must be addressed to the analyst.

Each section of this manual will have a menu showing the path to access the appropriate screen in FleetAnywhere. These menu listings are designed to help you get to the correct screen. They will look like this:

System Management➔Setup➔Access Rights➔Users

New Employees
System Management➔Setup➔Access Rights➔Users. All new employees must be assigned a user ID for FleetAnywhere. The Payroll Clerk assigns an employee number. The supervisor must inform the system administrator as to the level of access for each employee.

Passwords

System Management➔Setup➔Access Rights➔Change Password. All employees must have a password to access FleetAnywhere. Every user is responsible for the security of his or her password. Do not give your password to others. Designated people form customer departments have access to FleetAnywhere. Their access is limited to view only. We do not want anyone outside of our department changing our data so it is essential you safeguard your password. The integrity of the systems depends on each employee's security of their password.

Employee Data

Data➔Shop Activity➔Setup➔Employees➔Primary Information. Personal information on each employee to include home address, phone number and emergency point of contact is maintained in FleetAnywhere. The payroll clerk is responsible for entering and updating all employee information. Each employee is responsible for informing the payroll clerk of any change in personal information. Because of the sensitive nature of this information only the payroll clerk and supervisors have access to this information.

Access

System Management➔Setup➔Access Rights➔Users. Access to the various sections of FleetAnywhere is established on an individual basis according to the classification of each employee. If an employee needs increased access to other areas of the system, make a request to the System Administrator. Supervisors can request changes to the employee's access rights based on their specific duty requirements. As much access as possible should be given to employees in order to provide them as much information as possible.

Technical Training Records

Data➔Shop Activity➔Setup➔Employees➔Training. FleetAnywhere will maintain all training records for our employees. The Administrative Staff is responsible for maintaining these records for all employees. Supervisors should forward a copy of any training certificates to the Administrative Staff for updating.

End of Period Processing

System Management➔End of Period. The system administrator is responsible for performing end of day, end of month, end of quarter and end of year processing. The end of year processing will follow the fiscal year ending on August 31. End of quarter processing is run at the end of November, February, May and August. End of month processing is run on the first calendar day following the end of the month. The system administrator will also purge obsolete data during the end of month processing.

Vehicles

FleetAnywhere contains all of the vehicle information for City owned vehicles. One of our primary responsibilities is to ensure this information is accurate and current.

Vehicle information including VIN, license plate numbers, purchase date, sale date and other essential information is our responsibility to enter and maintain. No other department in the City has this information. We are the official record keepers under City rules and State law.

Processing New Vehicles

When new vehicles are delivered to the City, it is the Shop Supervisor's responsibility to ensure all data is entered into FleetAnywhere. Usually the Ticket Writers or the Shop Supervisors will enter new vehicles into the system. As much information as possible should be entered. Specific entries listed below must be completed.

Data➔Equipment Units➔Primary Information

Data➔Equipment Units➔Primary Information➔Basic Info Tab. All of the fields are self explanatory on this tab. The only fields not required are the two fields labeled "Associated File". All other fields must be completed. Specific requirements are as follows:

Equipment ID will always be a five digit number. Do not enter any spaces, dashes or any other symbols in the number. The first two digits of the Equipment ID will be the model year of the vehicle and the next three numbers will be the sequence number. For example 99001, 99002 etc. The sequence number is found by first filtering on the model year to see what the next number should be.

Equipment type must be entered in the form "YRMAKEMODEL", for example "99FORDTAURUS" or "00INTREFUSE". The equipment type is unique

for every year, make and model of vehicle. There will be hundreds of equipment types. This field is used to assist in identifying obsolete parts in inventory.

New Equipment Types

If the equipment type is not already in the system, add it to the system at **Data➜Equipment Units➜Setup➜Equipment Types.** It is essential that all equipment types are entered in the form "YRMAKEMODEL". Take care not to enter the same equipment type in a different form. All questions should be addressed to the System Administrator.

Asset number is used to identify Low Emission Vehicles, LEVs. If the vehicle is EPA certified to LEV standards, enter "LEV" in this field. Any questions about whether the vehicle is an LEV should be addressed to the System Administrator.

PM Program type is always "class."

Data➜Equipment Units➜Primary Information➜Meter Tab. The fields on this tab are self explanatory. Enter the correct value for the maximum meter value. This is essential so that if and when the meter rolls over FleetAnywhere will capture this information correctly.

The "Equipment Class for Meter Types" will be either "MILES", "HOURS", "MILEHOUR", "HOURMILE" or "NONE" depending on what type of meters the vehicle has. Most cars vans and pickups have only one meter and will go by "MILES" as meter 1. Construction equipment will always go by "HOURS" as meter 1. Those vehicles that have two meters must have one selected as meter 1 and one as meter 2. For trucks, meter 1 is miles and meter 2 is hours, "MILEHOUR". The one exception is the automated refuse trucks where meter 1 is hours and meter 2 is miles, "HOURMILE" .

If a vehicle has more than two meters use the two meters that control the primary function of the machine. For Gradalls and Vactors use the miles on the chassis as meter 1 and the hours on the auxiliary engine as meter 2, "MILEHOUR".

Data➜Equipment Units➜Primary Information➜Classes Tab. All vehicles are assigned to classes.   FleetAnywhere lists five different categories of classes; Maintenance, PM Program, Standards, Rental Rates and Shop Scheduling. Maintenance and PM Program are the two key categories that must be specified for all equipment. At this time we are not using the other three categories and they should be entered the same as the maintenance category or left blank.

Maintenance Classes: Maintenance classes begin with the letters "A", "C", "T", "M". All automotive type equipment including cars vans and pickups are assigned to an equipment class beginning with "A". All construction equipment is assigned to a class beginning with "C". All trucks over 1 ton are assigned to the "T"

classes. Any miscellaneous equipment not otherwise covered by "A", "C" or "T" is assigned to an "M" class.

PM Program Classes: PM Program classes begin with "P". Vehicles must be assigned to one of the PM classes and it will be different than the maintenance class. The PM class to assign the vehicle must be based on how the vehicle will be serviced. For example all standard cars vans and pickups are serviced the same way and must be assigned to PM class "PMAUTO".

Equipment Classes

If a new vehicle arrives and there is not an appropriate maintenance class or PM class, then notify the System Administrator. The System Administrator will determine if a new class needs to be created or whether to assign the vehicle to an existing class.

Data➔Equipment Units➔Primary Information➔Location Tab. These fields are self explanatory.   Only complete the first three fields for "Assigned PM", "Assigned Repair" and "Assigned Mobile". All vehicles must be assigned to one of the PM locations beginning with the letter "P". The appropriate PM location is based on the type of vehicle. Vehicles for Fire and EMS should be assigned to location "FD" and vehicles for the Airport should be assigned to location "AIR".

Data➔Equipment Units➔Primary Information➔Assignment Tab. The only field required on this tab is for the "Department ID".

Data➔Equipment Units➔Primary Information➔Accounts Tab.   The only field required on this tab is for the "Account ID".

Data➔Equipment Units➔Primary Information➔Status Tab. The only fields required are "Life Cycle Status Code A" and "Equipment Status of In Service".

Data➔Equipment Units➔Primary Information➔Authorization Tab. Place a check mark next to "Work Orders", "Usage Tickets" and "Fuel Tickets". Inform the administrative staff that you are entering a new vehicle and they will assign it a fuel card number. Do not release the vehicle to the customer until the fuel card has been made and placed in the vehicle. Fill the vehicle with fuel using the new card to verify the card works properly.

Data➔Equipment Units➔Primary Information➔Comments Tab.   Any comments that you feel are relevant may be entered in the "Comments" section. Anything you write in the "Message" section will always print on any work order for this vehicle.

Data➔Equipment Units➔Primary Information➔Ownership and Depreciation Tab. Always select straight line depreciation. Depreciation times must be entered for all equipment. The depreciation time for automotive equipment is 60

months, construction equipment is 120 months and trucks are 84 months. The salvage value will always be "0" and the salvage percentage will always be "10".

Data➜Equipment Units➜Primary Information➜Warranty Tab. Enter the vendor, time and mileage for the basic vehicle warranty. If the vendor is not listed in FleetAnywhere inform the system administrator.

Additional component warranties for engines, transmissions, hydraulic components etc., are addressed later in this chapter and must be entered on screen: **Data➜Equipment Units➜Specifications**

Data➜Equipment Units➜Primary Information➜Replacement and Disposition Tab. The fields for estimated replacement year, month and meter must be completed. Replacement times are five years/100,000 miles for cars vans and pickups, seven years/200,000 miles for trucks one ton and larger, ten years/10,000 hours for construction equipment, 10years/10,000 hours for miscellaneous small equipment and 10 years/200,000 miles for trailers. Also enter an estimated replacement cost. For example if a pickup truck is delivered in May 2001 then the estimated replacement time is May 2006. If the cost is $18000 today then it will probably cost around $23000 five years from now. Use your best judgment on estimating the replacement costs. An easy estimate would be to add 20% to the current price of an auto, 30% to a truck and 40% to construction equipment.

Data➜Equipment Units➜Primary Information➜Inspections Tab. Use this tab to enter the required information for Texas State Inspections, TSIs. New vehicles are not required to be inspected during the first two years and then must be inspected every year thereafter. Enter the month and year of the next inspection. It should be two years from now. The interval will be 12 months. Choose the appropriate inspection month.

Data➜Equipment Units➜Primary Information➜Codes Tab. Enter the type of fuel the vehicle uses. If a vehicle uses two types of fuel, such as unleaded and propane, then enter both types of fuel.

Data➜Equipment Units➜Primary Information➜Acquisition Tab. Enter the actual delivery date, the in service date and the original cost. In addition, enter the PO number, cost and vendor in this section. Enter the cost for one piece of equipment if there are several items listed on one PO. Do not deduct any trade in value from the original cost. Enter the bid number in the description section. If the vendor is not in the system inform the system administrator.

Old Vehicles

When vehicles are identified for auction or trade they must be brought into the shop with a "Prep for Auction" work order. The license plate must be removed and the vehicles must be stripped of decals and other City markings. The fuel card must be destroyed and any towing charges posted to the work order. It is essential that the fuel card be canceled as soon as the vehicle is brought in to be prepped for auction. Do not wait until the vehicle is actually sent to auction to inform the System Administrator. Supervisors must notify the System Administrator immediately when these actions have been completed on vehicles prepared for auction or trade in.

Updating Auction Vehicles

When vehicles are auctioned or traded in they need to be updated in FleetAnywhere. Do not take these steps without approval from the System Administrator. The System Administrator or the Information Entry Clerk will take these steps to remove a vehicle from FleetAnywhere. Vehicles cannot be deleted from FleetAnywhere but their records must be updated. Vehicles must not be updated until all charges have been billed. Billing is always done at the end of the month. Update the Equipment Primary records as follows:

Data➜Equipment Units➜Primary Information➜Meter tab➜ Change the meter type to "S99".

Data➜Equipment Units➜Primary Information➜Classes Tab➜ Change all classes to "S99".

Data➜Equipment Units➜Primary Information➜Assignment Tab➜ Change both Department ID fields to "ZZZZZZ".

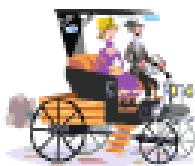**Data➜Equipment Units➜Primary Information➜Accounts Tab➜** Change Account to "99999".

Data➜Equipment Units➜Primary Information➜Status Tab➜ Change Procurement Code to "S" or "T". Change SLA Status to "OUT OF SERVICE".

Data➜Equipment Units➜Primary Information➜Authorization Tab➜ Remove all check marks. Delete fuel card number.

Data➜Equipment Units➜Primary Information➜Comments Tab➜ As you feel are appropriate.

Data➜Equipment Units➜Primary Information➜Class PM Tab➜ Change the next PM service to "0".

Data➜Equipment Units➜Primary Information➜Inspections Tab➜ Change month to "0" and inspection month to "NONE".

Data➔Equipment   Units➔Primary   Information➔Replacement   and Disposition Tab➔ Enter the actual Retirement and Disposition date. Enter the sale price if known. Enter who bought it or took it in on trade if known.

Meter replacements

When vehicles have the meter replaced we must update the Equipment Primary screen with this new information. This is essential to maintaining accurate records. Update the Equipment Primary records as follows:

Data➔Equipment Units➔Primary Information➔Meter tab.
Filter on the vehicle that has had the meter replaced and unlock the record.
In the box titled "METER RESETS" make the changes as indicated. Enter the date the meter was replaced. Enter which meter was replaced, either meter 1 or meter 2. Enter "Replacement" for the reason. Enter the new meter value on the new meter. For example if the new meter already has 25 miles on it then enter 25 miles in the "New meter value". Process the entry.

Do not process simultaneous changes to the latest meter reading, meter at delivery or a replacement meter.

Component Warranties

Data➔Equipment Units➔Specifications. Complete as much additional information as possible on the basic info, weights and capacities tabs. If the vehicle has warranties on major components such as the engine, transmission, body, etc enter them on the component warranty tab.

Part Numbers

Data➔Equipment Units➔Subsystems and Parts. This screen will list all part numbers for the vehicle subsystems. Subsystems include axles, tires, belts, hoses, filters etc. The part numbers for the individual vehicle or the vehicle type can be entered on this screen. If you do not know the part ID check with the parts specialists.

Chapter

3

Work Orders

FleetAnywhere contains all of the information for every repair performed on City owned vehicles. When something goes wrong with a vehicle you can be sure the technician will be the first one blamed. It is essential this information be accurate and current.

FleetAnywhere is the official record for all City owned vehicles. It contains the official vehicle maintenance records required by the State of Texas. It is essential the data contained in FleetAnywhere is accurate. Any accident investigations, insurance and liability claims, and financial decisions will rely on the information in this system. It is essential that all of our work orders are accurate and detailed in order to protect the City's interests.

Data➔Shop Activity➔Work Order Center. All work orders are opened on this screen. There are two types of work orders: Repair and PM. Repair orders are opened for unscheduled breakdowns. PM's are opened when a vehicle is in the shop for a scheduled service.

Repair and PM Work Orders
The following information applies to all work orders:

Data➔Shop Activity➔Work Order Center➔Basic Info. This tab contains the basic information about the work order. Essential fields are:

Equipment ID and mileage. It is essential that the correct mileage be entered on each work order. Before validating the mileage ensure it is accurate. Mileage never goes down. Do not validate a meter reading that is lower than the mileage already recorded in FleetAnywhere. Notify the System Administrator of any issues on mileage.

Repair Reason ID. Use the codes to identify why the vehicle is being brought to the shops. Be as accurate as possible. Specific requirements include:
"A" for those repairs that are the result of an accident.
"L" for installing decals and other items required for prepping vehicles for service.
"M" for processing vehicles for auction or disposal.
Check the box for "Date and Time Finished" and "Date and Time In Service" when the actual repairs are completed and the vehicle is released from the shop. Do not

close the work order until all of the parts, labor, commercial charges and comments have been entered on the work order.

Data➜Shop Activity➜Work Order Center➜Comments.   Enter comments sufficient enough to describe why the vehicle is being brought to the shop. Upon completion of the repairs enter comments to describe the actual work performed.

Data➜Shop Activity➜Work Order Center➜Labor. We must enter labor times based on established industry standard labor guides. The task ID must be entered. The date is always the current date. Never back date the labor. If the labor was performed while the technician was on overtime then use the time code for overtime. Otherwise the labor hours are usually direct time.

Data➜Shop Activity➜Work Order Center➜Parts. All parts moving out of the parts room must be issued to a work order. No work order, no parts, no exceptions. The date of issue is always the current date. Never back date the date the parts were issued. Ensure you are issuing the parts from the correct inventory location.

Data➜Shop Activity➜Work Order Center➜Commercial. Any work done by outside vendors must be entered on the work orders. The date is always the current date. Never back date the commercial charges. You must enter the vendor contract ID. Whenever possible, allocate the commercial charges to parts and labor. Always enter the vendor invoice number.

Data➜Shop Activity➜Work Order Center➜Delay. The delay function is used to track vehicle down time and to assist in the tracking of all work orders.

Data➜Shop Activity➜Work Order Center➜Messages.   If the message warning is flashing check this tab for any important information about the vehicle.

Repair and PM orders are essentially processed in the same manner. The major exception is on the PM work orders.

Data➜Shop Activity➜Work Order Center➜Tasks. Opening a PM work order will automatically update the PM schedule for that vehicle. If you are going to perform a weekly inspection or any other kind of preventive maintenance inspection that is not covered in the PM schedule for the vehicle, then you must go to this tab and enter "NO" in the field "Update PM Schedule".

The PM schedules and the tasks to be completed for each PM inspection are listed at **Data➜Equipment Units➜Set Up➜Equipment Class➜Class/Task Information.**

Commercial Charges

Any repairs performed by outside vendors must be posted to the work order. These charges will be posted as follows:

Data➔Shop Activity➔Work Order Center➔Commercial. Under the Task ID enter the task number. Enter today's date. <u>Never back date any commercial charges</u>. If you want to enter the actual date of the commercial repairs do so on the comments screen. Enter the Vendor ID and the Vendor Contract Number. <u>You must enter the vendor contract number</u>. Enter the labor cost total and the parts cost total. If the invoice does not split the labor and parts charges, then enter all of the charges as labor. Enter the vendor invoice number.

Chapter

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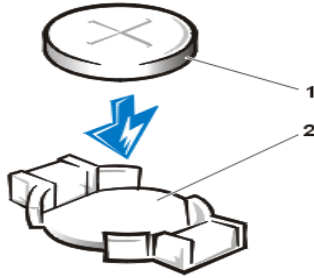
Parts

Quality repair parts are just as essential as well trained technicians to the cost effective and timely repair of equipment.

F leetAnywhere maintains all of the records for our parts inventory. It is the official record for all inventory transactions and accounting. It is essential the data contained in FleetAnywhere is accurate and that all of our parts inventory records are current and detailed.

Work Orders and Direct Issues

All parts are issued to either a work order or as a direct issue. For accountability, these are the only two ways parts are issued out of the parts rooms.

Data➔Shop Activity➔Work Order Center➔Parts. All parts moving out of the parts room must be issued to a work order. No work order, no parts. The date of issue is always the current date. Never back date the date the parts were issued. Ensure you are issuing the parts from the correct inventory location.

Data➔Parts Activity➔Direct Issues. Minor items that the operator can install on the vehicle should be issued as a direct issue without opening a work order. These items include wiper blades, first aid kits etc. Always issue parts to the "Equipment ID" and not the "Account ID" or the "Department ID". The document number will be the operator's name.

Parts Ordering

All parts are ordered against a Vendor Contract in FleetAnywhere. The vendor contract ID will correspond to a City of El Paso Purchase Order issued by the Purchasing Department. Do not order any parts from a vendor with whom we do not

have a valid City of El Paso purchase order. Parts will be ordered either for stock or for immediate issue to a work order.

Purchase Orders

Data➔Purchasing➔Quick Orders. The process described in the FleetAnywhere users manual published by Peregrine has sufficient detail to address Purchase Orders.

Stock Inventory Orders

Data➔Purchasing➔Quick Orders. All parts being received must have an invoice. On the Basic info tab you will enter Location ID and Vendor ID. On the Line Items tab you will enter Part ID, Vendor Contract ID, Gross Unit Price, Date Required and Quantity. The date is always today's date. Check Immediate Receipt, and enter Vendor invoice number. Ensure you are receiving the product into the correct inventory location.

Orders for a Specific Work Order

Data➔Purchasing➔Quick Orders. All parts being received must have an invoice. On the Basic info tab you will enter Location ID and Vendor ID. On the Line Items tab you will enter Part ID, Vendor Contract ID, Gross Unit Price, Date Required and Quantity. The date is always today's date. Check Immediate Receipt, and enter Vendor invoice number. Ensure you are receiving the product into the correct inventory location. Check immediate issue and enter the quantity issued and the work order number.

Vendor Contracts

All parts and commercial charges must be charged to a vendor contract. The accounting clerk is responsible for entering vendor contracts and for maintaining the funding levels for each contract.

Data➔Purchasing➔Vendor Contracts➔Contracts. To insert a new vendor contract, enter information in the appropriate fields:

Vendor contract ID will be the City of El Paso Purchase Order number. Begin date will be automatically filled in by FleetAnywhere. End date will be the expiration date of the Purchase Order and/or Contract. Purchasing limit is the dollar amount of the Purchase Order. Open POs will never go above $15000. Contract POs may have unlimited funds. Comments must include a brief description that will readily identify which parts and services are covered by this vendor contract.

Vendors

Data➔Purchasing➔Setup➔Vendors➔Primary Information. New vendors are added to the system as follows.

Basic Info tab: Vendor ID number, Name, Address, Phone, Accounting System Number is the Federal ID Number, check the Active box, Expiration Date enter 01/01/20.
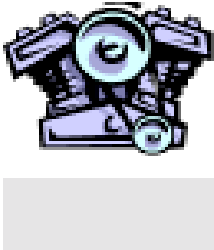
Functions tab: Check the appropriate services provided by this vendor.
Purchasing Info tab: Currency ID is USD and normal time of delivery is 12:00.
Locations tab: Supports all locations.

Inventory Adjustments

Data➔Parts Activities➔Adjustments.   Inventory adjustments are approved and entered in FleetAnywhere by the System Administrator. The results of all inventories must be reported to the System Administrator. These results must include a detailed justification as to why the inventory needs adjusted. Do not make any inventory adjustments on the inventory count screen.

Parts Transfers

Data➔Parts Activities➔Transfers.   The transfer of parts between locations is beneficial and is encouraged. You have the ability to see the stock status of all of the inventory locations within the department and if your coworker across town has the parts you need then you should transfer the parts. However, any transfer of parts between inventory locations must first be approved verbally by personnel of both the receiving and issuing parties.   While FleetAnywhere will allow you to transfer parts in the computer without informing anyone, we will not do any transfers unless both parties agree. This will ensure the parts are physically transferred and not just done on the computer. Use the comments tab to further clarify the transfer as you feel necessary.

New Part Numbers

The process described in the FleetAnywhere users manual published by Peregrine has sufficient detail to address adding new part numbers to the system. It is a three part process using the Part Primary Information, Part Location Information and the Vendor Part Information.

Data➔Parts Items➔Primary Information.

The product category and the part classification assist in defining the part. Detailed and accurate classifications will make searching and filtering easier. Place the part in the appropriate category.

Chapter

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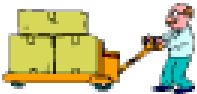
Fuel/Oil
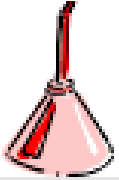
Fuel is the single largest expense item in the life time operation of equipment.
Oil is the cheapest item but provides the most critical element to a long operating
life.

F leetAnywhere maintains all of the records for our fuel and oil usage. Fuel transactions are processed automatically from all four of our fueling locations. All types of oils and fluids are considered parts and are processed in FleetAnywhere similar to parts. Attention to detail is critical as all of these transactions will change the inventory levels. Ensure the product you are issuing in FleetAnywhere is really the product your are issuing to the vehicle. Accurate record accountability is essential.

Oils and Fluids

Oil Receipts

Oil, grease, antifreeze and other fluids are ordered as parts using the quick order screen. Specific instructions are as follows:

Data➜Purchasing➜Quick Orders. All oil being received must have an invoice. On the Basic info tab you will enter Location ID and Vendor ID. On the Line Items tab you will enter Part ID, Vendor Contract ID, Gross Unit Price, Date Required and Quantity. Quantity for all fluids is quarts and the date is always today's date. Check Immediate Receipt, and enter Vendor invoice number. Ensure you are receiving the product into the correct inventory location.

After you receive the product in inventory it is available for issue. Oil and other fluids can be issued as a part on a work order or if a customer is a quart low you can also issue oil on the internal fuel ticket screen.

Oil Issues

Data➜Shop Activity➜Work Order Center➜Parts. All oil, grease, antifreeze and other fluids used in the service and repair of equipment must be issued to a work order. No work order, no parts. The date of issue is always the current date. Never back date the issue of any parts. Ensure you are issuing the parts from the correct inventory location.

Data➜Equipment Activity➜Fueling➜Internal Fuel tickets. The vehicle number is mandatory. You cannot issue fluids unless it is to a vehicle. The transaction date is always today's date. Never back date any transactions. Enter the current mileage of the vehicle. Enter the Fluid ID using the choice button. There are several different types of oil, ATF and coolant so ensure you are issuing the correct product. Enter the location you are issuing from and the quantity. Enter the quantity of oil in quarts.
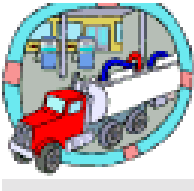
Fuel

Fuel Receipts

There are two types of fuel receipts. One is for delivery to our underground tanks at Lafayette, Raynor, Hondo Pass and Atlantic. The other is for deliveries to the tanks at all of the Fire stations and to both landfills.

Data➜Fuel Activity➜Receipt. To receive fuel into one of our facilities click on prepare for insert and enter the Tank ID (location). Enter the quantity received as the net amount shown on the invoice in gallons. Enter the unit price as price per gallon plus the Texas state gasoline tax. Enter Vendor ID.

Data➜Equipment Activity➜Fueling➜External Fuel tickets. To receive fuel at the Fire Stations or the landfills click on prepare for insert and enter the Equipment ID. The equipment ID will be McCombs, Clint or the Fire station number. Enter the fuel type as DSL for diesel or UNL for unleaded. Enter the fuel quantity not to exceed 999.0 gallons for each line. FleetAnywhere will only accept 999 gallons per line. You will have to make multiple line entries to enter the total amount of fuel actually delivered. Enter the fuel cost as the total amount on the invoice, not as a price per gallon. If you have multiple entries for the quantity then the total price for all lines should be the same as the invoice amount.

Fuel Issues

There are two ways to issue fuel. Manual fuel tickets are used to issue fuel from the service trucks or when the card readers at the pumps are inoperative. Automated fuel tickets are used to process all of the transactions recorded at the fuel pumps when the operators use the TECH21 fuel card.

Automated Fuel Transactions

All of the automated fuel transactions from our four fueling locations must be retrieved from the TECH21 Fuel System and uploaded into FleetAnywhere. This is the process to retrieve transactions in TECH21.

POLL ALL SITES: In TECH21from the main menu select:
Systems Functions Menu>Island Unit Operations>Poll All Island Units.
It will then prompt you with "Do you want debug trace for this I.U.? Y/N" Press Enter. This will automatically start the modem.
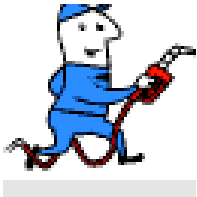
COPY FUEL TRANSACTIONS TO A DISK: In TECH21 the main menu:
Systems Function Menu>Transfer Data File>Transaction Xfer File
For specification file name, type **fletfuel**
From date, enter **00/00/2001**
From time, enter **0001**
To date, enter **00/00/2001**
To time, enter **2359 The total date and time will be the 24 hour period.**
Enter 3 times
The system will give you rows retrieved at bottom of screen. Insert floppy disk in drive A, Press Enter, Press Escape 2 times. Select "**e**" for Exit/Issue DOS Command, Enter "**t**" and press Enter to copy disk (will say 1 file copied, 1 file copied) press Enter to exit.

TO COPY FROM FLOPPY DISK TO DRIVE E:
From Windows NT desktop double-click on 'My Computer' Icon>3 ½ Floppy [A:]>Fuel
Scroll down to Word Pad, Highlight Word Pad, Click OK
From Menu Select File>Save As
Save As "fuel on 'ems' E"
File Name "type fuel.06012001.txt" Use the current date as the name.
Click on 'Save'
Close all windows opened

TO RUN FUEL TRANSACTIONS ON FA:
Data➜Equipment Activity➜Fueling➜Automated Fuel Tickets.
Setup tab: FA automatically assigns a Run ID number. Type in the 'Fuel System ID' **100**
Fuel Data Load tab: Run description: type in date of the transactions being processed; for example: **06062001** Fuel file name and path: type in path, for example: **d:\fuel\fuel.06062001.txt,** the only part that will change is the date. Click on 'Process'
Upload start date and time will automatically show up and a ✔ should appear in the 'Processing started' box. When all tickets have been processed, a ✔ should appear in the 'Processing completed' box. If there are any rejected tickets, the number will appear in the appropriate box.
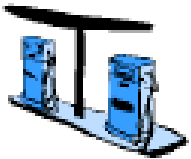
If there are Rejects, they will appear at the 'Transactions' tab; here you can scroll and look at rejects.

Manual Fuel Transactions

If the card readers at the fuel pumps are inoperative we will dispense fuel manually. All fuel issued from the service trucks must also be accounted for in this manner. Enter these transactions in FleetAnywhere as follows:

Data➔Equipment Activity➔Fueling➔Internal Fuel tickets.   The vehicle number is mandatory. You cannot issue fuel unless it is to a vehicle. The transaction date is always today's date. <u>Never back date any fuel transactions</u>. Enter the current mileage on the vehicle. Enter the Tank ID. Do not enter the Fuel Type. Enter the quantity of fuel in gallons and tenths.

Chapter

6

Reports

All time and effort spent entering data in the system is essential to retrieving accurate and meaningful reports. Lets avoid "garbage in, garbage out".

There are hundreds of reports available in FleetAnywhere. It would not be practical to list all of them in this manual. The reports menu is located at the top left of the screen. It is the white box under the "DATA" menu. When you select a report, the first prompt will be for a printer. If you leave this field blank, FleetAnywhere will print the report to the screen. These are the most common reports:

FINISHED WORK ORDERS. This report will list all of the work orders in a "FINISHED" status for a specific shop. These vehicles have been repaired and have left the shop. The work order is waiting for parts, labor, commercial charges or comments to be posted before it can be closed.

WORK LOAD REPORT. This report will list all of the open work orders by shop location. It is helpful for the shop supervisors as it will print a list of all vehicles in their shop.

PR:EQ-DUE FOR PM BY LOC. This report will list all vehicles due for service. You must first go to **Data➜Equipment Management➜Equipment Due for PM/Inspection** and filter on one of the shop locations starting with the letter "P". After you retrieve the data you must note the "Run ID" listed on the right middle of the screen. Use this ID number to print a copy of the report from the reports menu.

PR:WO-WO Detail. This report will print out a specific work order with all of the detailed parts and labor charges.